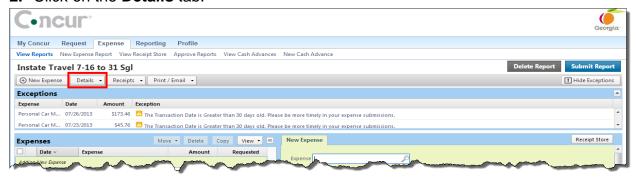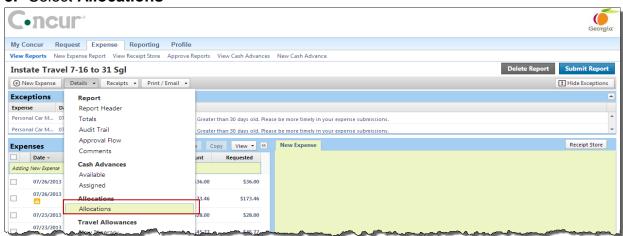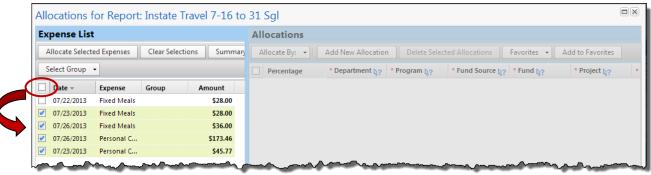# How to Use Allocation Favorites

1. Open the Expense Report with the items requiring allocation.
2. Click on the **Details** tab.

3. Select **Allocations**
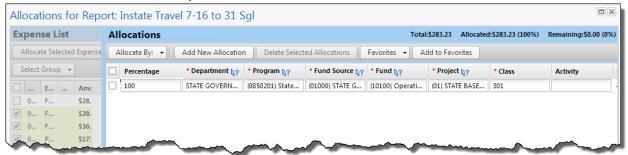

4. Select individual expenses or click on the box next to date to select all expenses

5. Click on **Allocate Selected Expenses**

6. The Allocations area opens

7. The default allocation type is Percentage. To allocate by amount click on the **Allocate By** tab and select **Amount**.

8. Click on **Allocation Favorites** to display a list of saved allocations
9. Click on the Allocation Favorite you want to use

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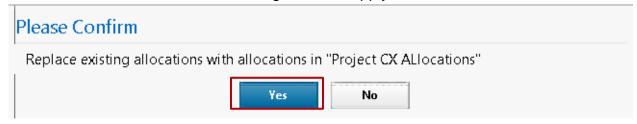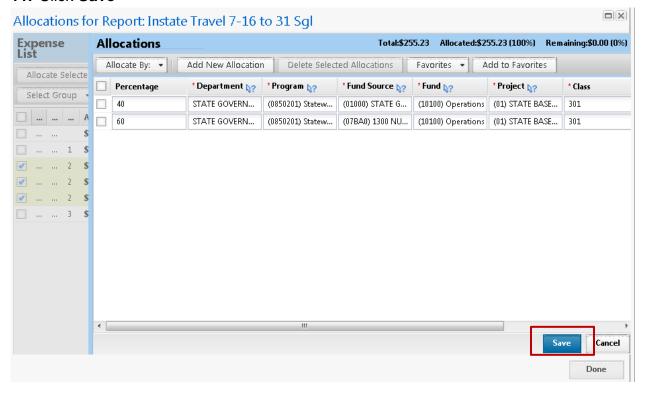**10.** Click **Yes** in the confirmation dialogue box to apply the saved allocations

Please Confirm

Replace existing allocations with allocations in "Project CX ALlocations"

| Yes | No |

11. Click **Save**

Allocations for Report: Instate Travel 7-16 to 31 Sgl

| **Expense List** | **Allocations** | | | | Total:$255.23 | Allocated:$255.23 (100%) | Remaining:$0.00 (0%) |

| Allocate By: ▼ | Add New Allocation | Delete Selected Allocations | Favorites ▼ | Add to Favorites |

Allocate Selecte

Select Group ▼

	Percentage	* Department	* Program	* Fund Source	* Fund	* Project	* Class
☐	40	STATE GOVERN...	(0850201) Statew...	(01000) STATE G...	(10100) Operations	(01) STATE BASE...	301
☐	60	STATE GOVERN...	(0850201) Statew...	(07BA0) 1300 NU...	(10100) Operations	(01) STATE BASE...	301

Expense list rows (left panel):
☐ ... ... A
☐ ... ... $
☐ ... ... 1 $
☑ ... ... 2 $
☑ ... ... 2 $
☑ ... ... 2 $
☐ ... ... 3 $

| Save | Cancel |

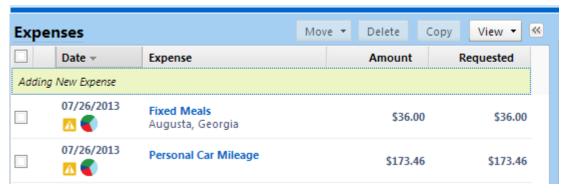| Done |

.

12. Click **OK**

Success

Allocations have been saved.

| OK |

13. Click **Done** exit Allocations and return to the Expense Report detail

14. Any items that have been allocated will display a pie shaped icon. Hover over the icon with the mouse to view the allocations for that item.

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